THE CITY OF
**COLUMBUS**
ANDREW J. GINTHER, MAYOR

City of Columbus Vendor Services

User Guide

July 2017

## Contents

## Vendor Portal Administrators

City of Columbus Vendor Services requires each vendor to have a Vendor Portal Administrator.  The first contact added when a vendor registers will, by default, become the Vendor Portal Administrator.  The Vendor Portal Administrator is responsible for maintaining additional users and contacts associated with the vendor's account.   Additional instructions are available below.

## Register New Vendor

**City of Columbus Vendor Services requires users to use a Yahoo, Windows Live ID, Facebook or Google account to login.  If you do not have a Yahoo, Windows Live ID, Facebook or Google account, please create an account with one of these providers <u>before</u> beginning vendor registration.  You will use this account to access the City of Columbus Vendor Services site in the future.**

**The City will NOT know what provider email account you use to register.  Please make a note of the account in your records to ensure future successful login.**

1. In a web browser, open http://vendors.columbus.gov/sites/public.
   **Note**: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select the **click here** link located under the New Users Section.
3. The following message will be displayed to redirect you to Windows Azure for authentication:



You will now be redirected to a third-party provider for sign-up authentication via Windows Azure Access Control Service.

4. Select **OK** to continue.
5. You will be prompted to sign in using either a Yahoo, Windows Live ID, Facebook or Google account.  Select the account you wish to use to sign in.

6.  You will be prompted to sign into your account.
7.  Complete sign-in as directed.
8.  You may see the following message.  Select **Allow** to continue.



9.  Once you have signed in select **Register me** to register a new vendor account.
10. Terms and Conditions of Use will be displayed.  Please read the terms and conditions and place a checkmark next to "Check to acknowledge and agree".  Select **Next**.
11. Enter you Federal Tax Identification Number.  Select **Next**.

**The following message is displayed if the vendor you are trying to register is already registered with the City of Columbus.**
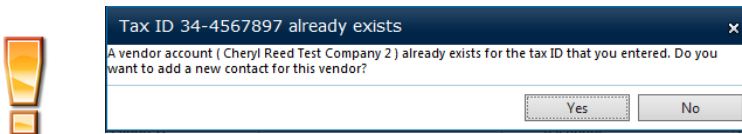


**If this message is displayed, you may still add yourself as a new vendor contract.  Select <u>Yes</u> to add yourself as a new vendor contact and refer to the Section Register New Vendor Contact (Existing Vendor).**

12. You are now prompted to enter company and contact information.  Complete all applicable fields and select **Next**.  See Notes below.

**Company and Contact Information Notes**

- **Ensure that you enter the company's email address and not your email address under company information.  <u>This email address will be used by the City to notify vendors of procurement opportunities.</u>**
- **Ensure that you enter your email address under the contact column as this email address will be used to further communicate with you during the registration process.**
- **Entering the zip code first will populate City and State information for you automatically.**
- **Selecting "Same as Company" under the contact information column will populate company address information for you in the Contact column.**

13. The Business Information screen is displayed.  Indicate if you are:
    a. Minority owned
    b. Woman owned
    c. A small business
    d. Locally owned
14. Indicate the type of Tax ID you are providing during registration.
15. Indicate the number of employees.
16. Select a line of business, then select **Next**.
17. You are now prompted to select Procurement Categories that pertain to your vendor.



   a. Enter a category search value and select **Search**.
   b. Search results will be displayed on the left side of the screen.  Select the corresponding category from the list.
   c. The right hand side of the screen will show the selected value in the list of categories. Place a checkmark next to the value to associate this category with your vendor.
   d. Repeat steps a-c until all categories you wish associated with the vendor are selected.
18. Select **Finish**.
19. You will see the message "Your registration has been received by City of Columbus Vendor Services".  This completes the initial vendor registration process but additional steps are needed before you can login into the vendor portal.  See Vendor User Account (New Vendor) Section below.

**Before you can access the Vendor Portal, a verification step will take place.**

**After verification, you will receive an e-mail from the City regarding your registration.**

**We strive to complete these verifications quickly.  In most instances, you should receive communication from the City within one business day. If you have not received communication within two business days, please contact us at vendorservices@columbus.gov.**
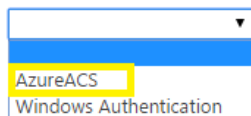
20. You will receive an email indicating that you have been added as a vendor and now have access to the City of Columbus Vendor Services site.
21. The registration process is complete.

## Logging into City of Columbus Vendor Services

1. In a web browser, open http://vendors.columbus.gov/sites/public.
   Note: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select the **click here** link located under the Registered Users Section.
3. The following page will be displayed.  Select AzureACS.

Sign In

Select the credentials you want to use to logon to this SharePoint site:

AzureACS
Windows Authentication

4. You will be prompted to sign in using either a Yahoo, Windows Live ID, Facebook or Google account.  Select the account you wish to use to sign in.

Sign in to Unsolicited vendor signup
(YVWLNAXEPWEB01)

Sign in using your account on:

Yahoo!

Windows Live™ ID

Facebook

Google

5. You will be prompted to sign into your account.  Complete sign-in as directed.
6. Upon, successful login, the Vendor Services site will be displayed.

**For assistance with logging into Vendor Services, please contact vendorservices@columbus.gov. We strive to respond to inquiries in a timely fashion.  In most instances, you should receive communication from the City within a half business day.**

## Vendor Maintenance

### Register New Vendor Contact (Existing Vendor)

**City of Columbus Vendor Services requires users to use a Yahoo, Windows Live ID, Facebook or Google account to login.  If you do not have a Yahoo, Windows Live ID, Facebook or Google account, please create an account with one of these providers before beginning vendor registration.  You will use this account to access the City of Columbus Vendor Services site in the future.**

**The City will NOT know what provider email account you use to register.  Please make a note of the account in your records to ensure future successful login.**

1. In a web browser, open http://vendors.columbus.gov/sites/public.
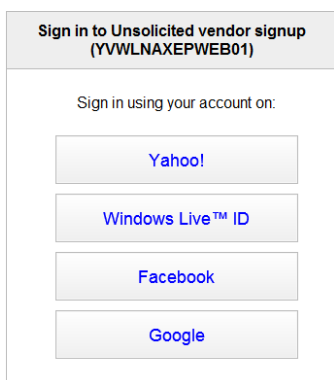   Note: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select the **click here** link located under the New Users Section.
3. The following message will be displayed to redirect you to Windows Azure for authentication:



You will now be redirected to a third-party provider for sign-up authentication via Windows Azure Access Control Service.

4. Select **OK** to continue.
5. You will be prompted to sign in using either a Yahoo, Windows Live ID, Facebook or Google account.  Select the account you wish to use to sign in.



6. You will be prompted to sign into your account.
7. Complete sign-in as directed.
8. You may see the following message.  Select **Allow** to continue.

9. Once you have signed in, search for your company by entering the vendor name or federal tax id. Select **Search**.

> 
> **If searching by federal tax id you must enter the full tax id in order to return results.**
>
> **If searching by vendor name, you may enter partial values i.e. Supp will return Support Systems, Support Solutions, etc…**

10. Vendors matching your search criteria will be displayed.  Highlight the correct vendor to proceed.  Select **Use the selected company**.  Note:  Make a note of the Vendor Portal Administration for the selected vendor as you may need to contact them later.

11. Terms and Conditions of Use will be displayed.  Please read the terms and conditions and place a checkmark next to "Check to acknowledge and agree" if it is not already selected.  Select **Next**.

12. You are now prompted to enter your contact information.  Complete all applicable fields and select **Finish**.  See Notes below.

> 
> **Company and Contact Information Notes**
> - **Verify the Contact name field contains your first and last name.**
> - **Selecting "Same as Company" under the contact information column will populate company address information for you in the Contact column.**

13. You will see a message indicating "Your registration has been received."

14. The Vendor Portal Administrator (that you noted in step 10) is responsible for verifying your account.  Please contact this individual to continue the registration process.

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## Attach W-9 to Vendor Record

**Please provide the City of Columbus a W-9 in a timely fashion and provide updated W-9's as requested. A vendor will be placed on "Hold for Payments" until a W-9 is received and reviewed by the City Auditor's Office.**

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Profile** from the Common menu located on the left navigation bar.
3. Your vendor profile will be displayed. Select **Attachments**.



4. Select **Upload document**.
5. The Add Document window will display.
6. Enter a **Description**. For example: 2017 W9 XYZ, Co.
7. Select **W9/W8** in the **Type** field.
8. Select **Browse** and locate the applicable document.
9. Select **OK**.

10. You will be returned to the Attachments page.  Verify your W9 appears in the list of documents.
11. W9's are typically processed in one to two business days.

## Update your Vendor Profile

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Profile** from the Common menu located on the left navigation bar.
3. Your vendor profile will be displayed.  Select **Edit**.

### Update Address

1. Select **Address**.  This will expand the Address section.
2. Select **Add**.
3. Enter an additional address for your business and select **Save and Close**.
4. Select **Address** again to minimize the Address section.
5. Select **Close** to exit the vendor profile.

### Update Contact Information

1. Select **Contact Information**.  This will expand the Contact Information section.
2. Highlight the contact information line you wish to update and select the **Details** button.
3. Select **Edit** on the View contact information screen.
4. Update the information accordingly and select **Save and Close**.

### Add Attachments to your Vendor Profile

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Profile** from the Common menu located on the left navigation bar.
3. Select **Attachments**.
4. Select **Upload document**.
5. Enter a description for the document.
6. Select Document from the Type field pick-list.
7. Select **Choose File**.
8. Navigate and attach your document.  (During the pilot, select a PDF or Word document to attach for testing purposes.)
9. Select **OK**.
10. You will see the attachment listed on the screen.
11. Select **Close**.
12. Select **Close** again to close the Vendor Profile.

## Create Category (UNSPSC Codes) Request

City of Columbus Vendor Services converted NIGP codes associated with your vendor account to UNSPSC codes.  It is likely you will want to add additional UNSPSC codes to your account.  UNSPSC Codes are called categories within Vendor Services.  Bid notifications you receive as a vendor are based on categories associated with your vendor account.  A category request allows you to add new categories.

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. First, view categories associated with your vendor account by selecting **Profile** from the Common menu located on the left navigation bar.
3. Select **Category Information** to expand the Category Information section.
4. After viewing categories associated with your vendor account, select **Close** to close the Vendor Profile.
5. Select **Category requests** from the Common menu located on the left navigation bar.
6. Select Category request from the upper left hand corner to create a category request.
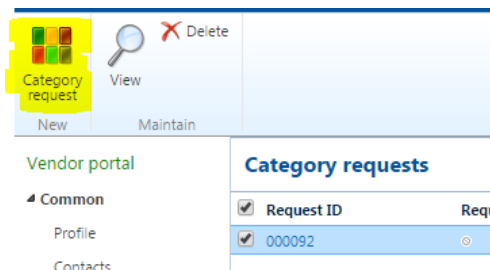


7. You are now prompted to select Procurement Categories that pertain to your vendor.
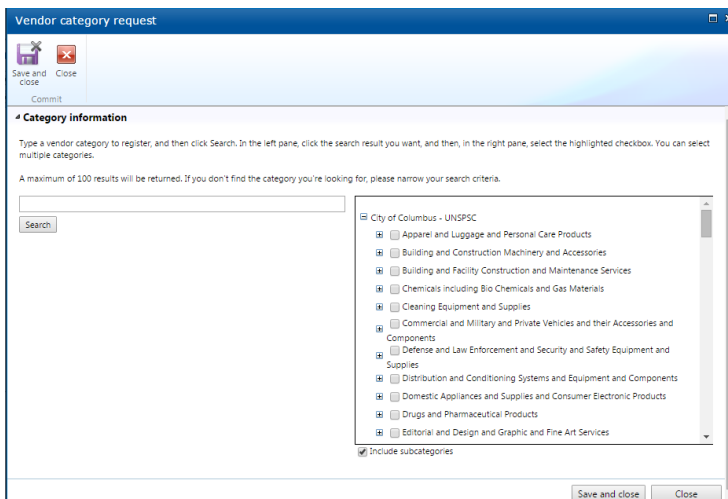


   a. Enter a category search value and select Search.
   b. Search results will be displayed on the left side of the screen. Select the corresponding category from the list.
   c. The right hand side of the screen will show the selected value in the list of categories. Place a checkmark next to the value to associate this category with your vendor.
   d. Repeat steps a-c until all categories you wish associated with the vendor are selected.
8. Select **Save and Close**.
9. To submit your request to have your select categories added to your vendor record, select **Submit** located on the yellow bar at the top of the page.
10. Enter a comment if applicable and select **Submit**.

11. Your request will show in the Category Request list with a status of Application Submitted.
12. Return to this screen at a later time to see that the status shows as approved.

## Delete Categories associated with your Vendor Account

City of Columbus Vendor Services converted NIGP codes associated with your vendor account to UNSPSC codes. You may want to review and remove UNSPSC codes from your account that are not applicable. UNSPSC Codes are called categories within Vendor Services. Bid notifications you receive as a vendor are based on categories associated with your vendor account.

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Profile** from the Common menu located on the left navigation bar.
3. Select **Edit**.
4. Select **Category Information** to expand the Category Information section.
5. Select the category you wish to remove. The row will be highlighted.
6. Select **Remove**.

## Approving Additional Vendor Contacts

Additional vendor contacts may use the "Register New Vendor Contact" process to associate themselves as a contact for your vendor and gain access to Vendor Services. The Vendor Administrator is responsible for approving and creating a user account for these individuals.

**Note:  Only Vendor Portal Administrators may complete this function.**

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Unconfirmed vendor contacts** from the Common menu located on the left navigation bar.
3. Place a checkmark next to the contact you wish to confirm and select **Create Vendor Contact**.
4. Verify and update first name, last name, and job title information as applicable. Select **Create**.
5. The Edit Contact screen is displayed allowing you to view and/or update address and contract information, and user roles for the vendor contact. Update this information as appropriate and select **Save and Close**.
6. Select **Contacts** from the Common menu located on the left.
7. Place a checkmark next to the contact you want to make a vendor user and select **Add Vendor User** from the top navigation bar.
8. The following window is displayed. Update User Role to "Vendor (external) – Public sector". Select  **Save and Close**.

9. The following window is displayed. Select **Submit**.



10. Enter any applicable comments and select **Submit**.
11. An email notification will be sent to the newly created contact with a link to access Vendor Services.

> You can check the status of a user's account by selecting User Requests from the Common menu located on the left navigation bar. The Status column will display "Authentication pending" or "Completed" for each user.

12. The user registration process is complete.

## EBO Questionnaire

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Selecting **Questionnaires** from the Common menu located on the left navigation bar.
3. You will see a questionnaire named EBO Quest.
4. Select the questionnaire.

5. Question 1 will be displayed.
6. Answer question 1 and select **Forward**.
7. Proceed through the questionnaire answering each question and selecting **Forward** to continue.
8. Once you have reached and answered the last question select **End**.
9. The Status for the questionnaire will be updated to Finished.

## Complete and Submit a Bid for an RFQ

Vendors will be notified via email of new requests for quotations matching categories they have registered for.  Upon receipt of the email, follow the instructions below to review and submit a bid.

> **You may also bid on open requests for quotations that do not match categories you have registered for.  See** Bid on RFQ when Vendor not registered for the RFQ bid category **for additional assistance.**

1. Login to the City of Columbus Vendor Services Site (See Logging into City of Columbus Vendor Services for additional assistance.)
2. Select **Requests for quotations** from the My Documents menu located on the left navigation bar.
3. A list of requests for quotations matching categories you have registered for will be displayed.
4. Highlight the request for quotation you wish to bid.
5. If the RFQ has Header attachments, view these documents. (See View Request for Quotation Attachments for additional assistance.)
6. Select the Request for quotation BID ID to view the request for quotation.
7. Review the following bid sections:
   a. General
   b. Request for quotation description
   c. Bidding guidance items
   d. Lines.
      i. Highlight each line and select details to view specifications.
      ii. View Request for Quotation Line Attachments (if applicable).
   e. Amendments (if applicable)
   f. Delivery/payment terms
8. When ready to bid RFQ lines, Select **Bid**.
9. Locate the **Lines** section.
10. Highlight a line and select **Detail**.
11. Enter unit price in Quantity tab and comment if applicable and select **Save and Close**.
12. Repeat for each line within the RFQ.
13. Review your bid information and select **Submit**.

| | Vendors may also complete the following actions for Bids: |
|---|---|
| Complete Bid Questionnaire | RFQs may require a vendor to complete questionnaires as part of the bid process. |

| | |
|---|---|
| **Add Vendor Questions** | For requests for quotations that allow vendors to submit questions, the vendor may submit one or more question.  Note that it is the vendor's responsibility to return to Vendor Services to view question responses prior to the bid expiration date. |
| **Recall a bid** | Bids may be recalled prior to the bid expiration date as necessary to make corrections or updates. |
| **Alternate bid for an item** | Most requests for quotations allow vendors to submit alternate bids. |
| **Add Attachments to a bid line** | Vendors may attach appropriate documentation to each bid line. |

## Add Attachments to a Bid Line

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the request for quotation that you wish to add attachments too.
3. Select the line you wish to add an attachment too.
4. Select **Attachments** menu option.



5. Select **Upload document**.
6. Enter a Document description.
7. Select **File** as the Document type.
8. Select **Browse** to locate your file.
9. Select **OK**.
10. Repeat until all applicable documents have been attached.
11. Select **Close**.

## View Amendments

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the request for quotation that you wish to view the amendment for.
3. Locate the **Amendments** section of the RFQ and select to expand the section.
4. RFQ Amendments will be displayed.
5. For RFQ Amendments that include an attachment, highlight the applicable amendment and select **View attachment**.

## Adding an Alternate Bid on an item

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the requests for quotations.
3. Locate the **Lines** section and expand the section.
4. Select the line you wish to add an alternate.
5. Select **Add alternate**.
6. Select the new line item and enter the following:
   a. Product Name
   b. Quantity
   c. Unit Price
   d. Comment (if applicable)
   e. Attachment (if applicable)
7. Repeat as necessary for applicable line items.

| Line number | Item number | Product name | Status | Quantity | Unit | Unit price | Net amount | Alternate | D |
|---|---|---|---|---|---|---|---|---|---|
| 10 | | Area rug, 12' x 20' | New | 4.00 | EA | 0.00 | 0.00 | No | |
| 10 | | | New | | EA | 0.00 | 0.00 | Yes | |

## Complete Bid Questionnaire

1. If the RFQ has an associated questionnaire, navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to complete a bid questionnaire for.
3. Locate the **Questionnaire** section of the RFQ and select to expand the section.
4. Select **Complete Questionnaire** and follow on screen instructions.
5. Once you have completed the questionnaire, the status of the questionnaire will indicate Completed.

## Add Vendor Question

1. Navigate to My Documents → Requests for quotations
2. Select the requests for quotations that you wish to submit a question for.
3. Locate the **Vendor Questions** section of the RFQ and select to expand the section.
4. Select **Add.**
5. Enter your question into the question field.
6. Select **Save**.

## View Vendor Question Answers

1. Navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to view vendor questions and answers for.
3. Locate the **Summary questions and answers** section of the RFQ and select to expand the section.
4. View submitted vendor questions and answers.

## Recall a Bid

A vendor may recall their bid in order to update their bid, add attachments, add alternative bids, etc… A bid cannot be recalled after the bid expiration date.

1. Navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to recall.
3. Select the **Recall** menu option located at the top of the screen.
4. The message 'Are you sure you want to recall this bid?'
5. Select **Yes** to recall the bid.
6. Select **No** to return to the RFQ without recalling the bid.

## View Request for Quotation Attachments

Each RFQ may have one or more attachments. These are documents that are attached to the Request for Quotation and provide additional information specific to the RFQ. Examples include: reference forms, specifications, drawings, etc…

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Place a checkmark next to the request for quotation that you wish to view attachments for.

**RFQs that have documents (attachments) associated with them will have a checkmark in the Document column.**

| | Request for quotation | Status | Case ID | Document title | Solicitation type | Bid type | Requested delivery date | Expiration date and time | Document |
|---|---|---|---|---|---|---|---|---|---|
| ☑ | BID000438 | New: Action required | RFQ000116 | Cheryl Test | ITB | Sealed | 10/16/2015 | 10/16/2015 4:00:00 PM | ✓ |
| ☐ | BID000436 | New: Action required | RFQ000114 | Email test RFQ | ITB | Sealed | 10/15/2015 | 10/18/2015 1:00:00 PM | ☐ |
| ☐ | BID000435 | New: Action required | RFQ000113 | Multi-line RFQ for Slush Malt Shop | ITB | Sealed | 10/15/2015 | 10/16/2015 4:30:00 PM | ☐ |
| ☐ | BID000433 | New: Action required | RFQ000111 | Single-line RFQ for Slush's Hard Cider | ITB | Sealed | 10/15/2015 | 10/16/2015 4:00:00 PM | ☐ |

**Requests for quotations**

3. Select **Attachments – Attachments** from the top menu.
4. A list of attachments is displayed.
5. Select the attachment you wish to view and select the file name to open or select **Open document** from the top menu.
6. The document will open.
7. Select **Close** to close the Attachments screen.

## View Request for Quotation Line Attachments

These are documents that are attached to the Request for Quotation line and provide specific information about a product or service. An example could be travel procedures and guidelines.

1. Navigate to My Documents → Requests for quotation or Public Documents → Open requests for quotation.
2. Open the request for quotation that you wish to view attachments for by clicking on the link that starts BID.

> **RFQ Lines that have documents (attachments) associated with them will have a checkmark in the Document column.**

| Line number | Item number | Product name | Status | Quantity | Unit | Alternate | Document | Comment |
|---|---|---|---|---|---|---|---|---|
| 10 | | Standard corn broom | New | 6.00 | EA | No | ✔ | |
| 20 | | Floor mop (wet) | New | 6.00 | EA | No | ✔ | |
| 30 | | Scouring sponge | New | 100.00 | EA | No | ✔ | |
| 40 | | Janitor's cart, fiberglass | New | 2.00 | EA | No | ✔ | |

3. Locate the Lines section and expand if not already open.
4. Highlight the line you wish to view attachments for.
5. Select **Attachments** from the Lines menu.
6. A list of attachments is displayed.
7. Select the attachment you wish to view and select the file name to open or select **Open document** from the top menu.
8. The document will open.
9. Select **Close** to close the Attachments screen.

## Bid on RFQ when Vendor not registered for the RFQ bid category

1. Login to the City of Columbus Vendor Services Site (See "Logging into City of Columbus Vendor Services" for additional Assistance.)
2. Select **Open requests for quotations** from the Public documents menu located on the left navigation bar.
3. All open requests for quotations will be displayed.
4. To view additional information for an RFQ, select the RFQ number.
5. Select **Bid**.
6. See Complete and Submit Bid for an RFQ Section.

# View Open Requests for Quotations

Unregistered vendors can view open requests for quotations by completing the following steps.

1. In a web browser, open http://vendors.columbus.gov/sites/Public/VendorPortal/.
   Note: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select **Open Requests for Quotations** located under Public Documents.
3. A list of open RFQs will be displayed.
4. To view additional information, select the RFQ number.

# View Confirmed Purchase Orders

Vendors will receive email notification when a purchase order has been issued. This email will be sent to the email address associated with the vendor's account. See the section Update Contact Information to change the email address associated with your vendor record.

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ANDREW J. GINTHER, MAYOR

> **In order to view Purchase Orders, you must use Internet Explorer and have Silverlight installed or install Silverlight when prompted.**

1. Login to the City of Columbus Vendor Services Site (See Logging into City of Columbus Vendor Services for additional Assistance.)
2. Select **My purchase order confirmations** located under My documents.
3. Select the purchase order from the list or enter the purchase order number into the filter box located on the right hand side above the purchase order list, select Purchase Order (*note: this defaults to purchase order confirmation, you will need to change*) from the drop-down list and select →.

| Purchase order confirmations | | | | | PO000077 Purchase order ▼ → |
|---|---|---|---|---|---|
| Purchase order confirmation | Invoice account | Purchase order | Date | Currency | Amount in transaction currency |
| 005004 | 013091 | PO000083 | 1/20/2016 | USD | 100.00 |
| 005007 | 013091 | PO000076 | 1/20/2016 | USD | 125.00 |
| 005008 | 013091 | PO000077 | 1/20/2016 | USD | 300.00 |

4. To view the purchase order, ensure the purchase order you wish to view is selected and select **Attachments**.

**Vendor Home | All confirmed purchase orders**

Attachments
▼
Attachments

5. Select **TCM Document Explorer** to view the Purchase Oder.  DO NOT SELECT ATTACHMENTS.
6. Your purchase order documentation will load.  Please note there may be more than 1 document available for viewing.  Please ensure that the latest purchase order document is selected on the left-hand side.

7. To print your PO, select the printer icon from the menu located at the top of the document displayed.



## Revision History

| | | |
|---|---|---|
| Add Section "View Confirmed Purchase Orders | 3/1/2016 | Cheryl Reed |
| Add Section "Attach W9" to Vendor Record | 7/14/2017 | Cheryl Reed |